



# Researcher Welcome Guide

## Welcome to GrantForward!

Researchers can benefit from our complete award-seeking cycle including a comprehensive database of funding opportunities across all disciplines, a worldwide sponsor directory, and additional sources of pre-solicitations and funded awards. You can also take advantage of many advanced utilities such as getting funding alerts, receiving grant recommendations based on your research interests and matching grants delivered from administrators, etc.

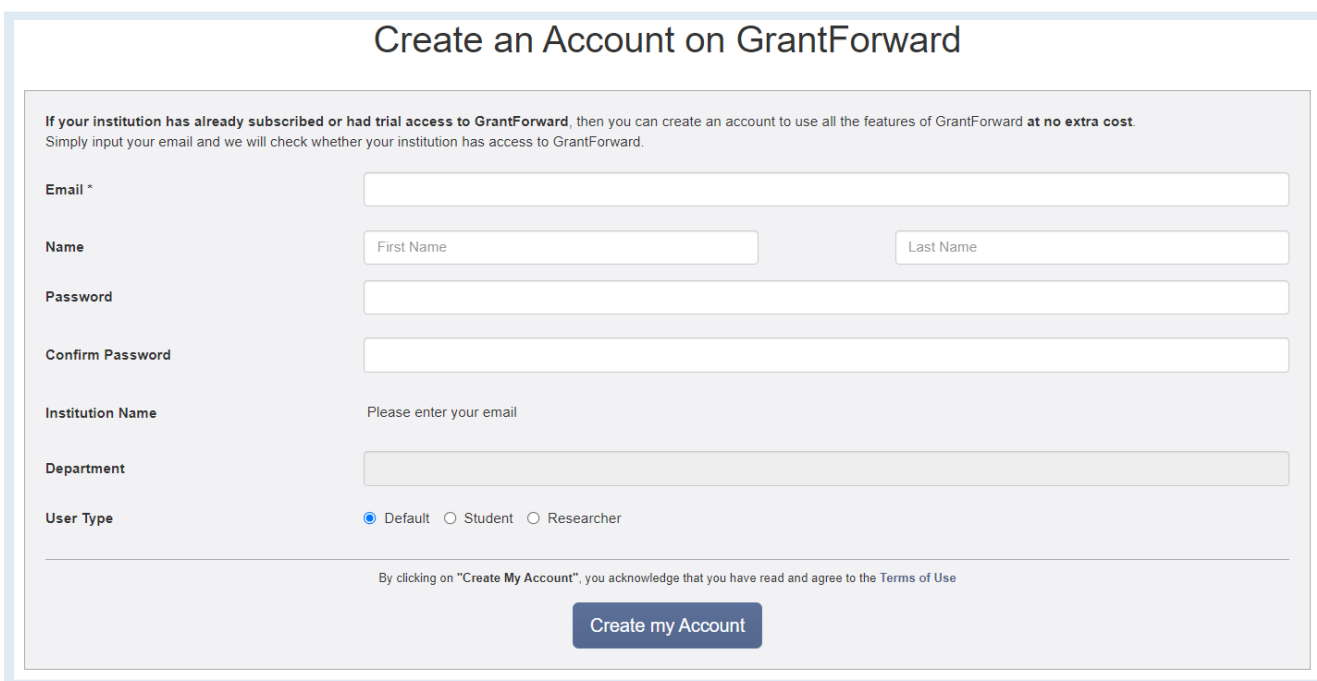
## In this Researcher Guide, you will learn:

- ▶ Creating Your Account
- ▶ Trying a Grant Search
- ▶ Managing Search Results
- ▶ Managing Grants
- ▶ Checking Out Pre-solicitations, Awards, and Sponsors
- ▶ Creating Your Researcher Profile
- ▶ Receiving Grant Recommendations
- ▶ Exploring Your Personalized Homepage

# Creating Your Account

In order to use search functionality and basic features on GrantForward, you must create your account first. To make your account, just follow these steps:

- 1 Click on **Sign Up** on the upper right side of the GrantForward homepage.
- 2 On the **Create an Account** page, enter your institution's email and necessary information for your account.



The screenshot shows the 'Create an Account on GrantForward' page. At the top, it says 'Create an Account on GrantForward'. Below that, a note states: 'If your institution has already subscribed or had trial access to GrantForward, then you can create an account to use all the features of GrantForward at no extra cost. Simply input your email and we will check whether your institution has access to GrantForward.' The form includes the following fields: 'Email \*' (a single input field), 'Name' (split into 'First Name' and 'Last Name' input fields), 'Password' (a single input field), 'Confirm Password' (a single input field), 'Institution Name' (with the placeholder text 'Please enter your email'), 'Department' (a single input field), and 'User Type' (with radio buttons for 'Default' (selected), 'Student', and 'Researcher'). At the bottom, there is a checkbox for 'By clicking on "Create My Account", you acknowledge that you have read and agree to the Terms of Use' and a 'Create my Account' button.

- 3 Check your inbox (and the spam folder too!) for a confirmation email. Confirm by clicking on the link in the email. Then, you can log in to use GrantForward-- click on **Log In** on the upper right side of the screen.

GrantForward QuickTip  
For Researchers

Creating an Account

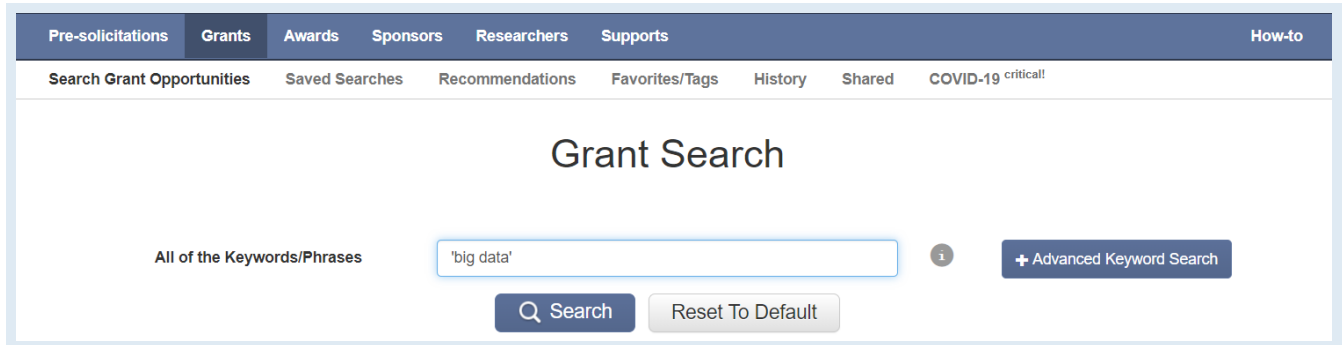
For more guidance, you can view a step by step demo--  
**QuickTip: Creating an Account**

# Trying a Grant Search

Next, you can try out how to search on GrantForward by keywords/phrases and advanced filters to find funding opportunities that match your research topics. Under the **Grants** tab, choose **Search Grant Opportunities**.

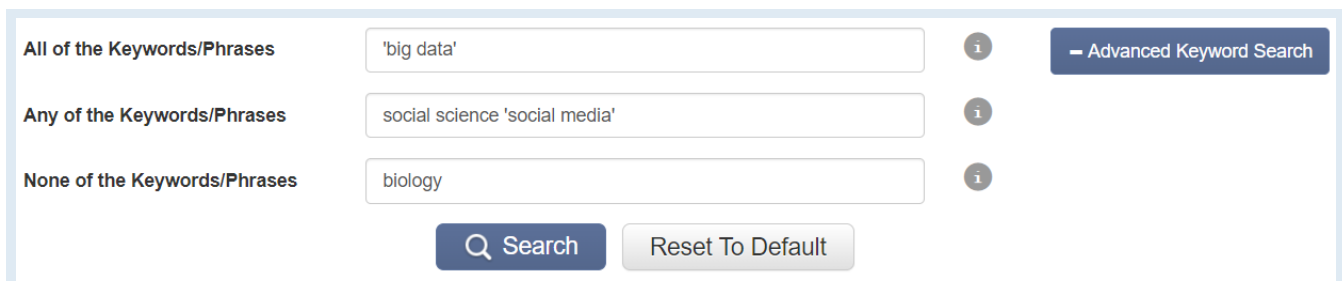
## Executing a Search

- 1 In the **All of the Keywords/Phrases** box, enter any words or phrases related to your fields of research (use quotes to match the whole phrase, space, or comma to separate the terms). Press Enter or click on the **Search** button to execute the search.



The screenshot shows the GrantForward website's search interface. At the top, there are navigation tabs: Pre-solicitations, Grants (selected), Awards, Sponsors, Researchers, Supports, and How-to. Below these are sub-tabs: Search Grant Opportunities (selected), Saved Searches, Recommendations, Favorites/Tags, History, Shared, and COVID-19 critical!. The main heading is "Grant Search". Below the heading, there is a search box labeled "All of the Keywords/Phrases" containing the text "'big data'". To the right of the search box is a blue button labeled "+ Advanced Keyword Search". Below the search box are two buttons: "Search" and "Reset To Default".

- 2 You will see the results quickly pop up for you to sift through. The results, by default, are sorted by **Relevance** to your keywords.
- 3 You can click on **Advanced Keyword Search** to switch keyword mode then enter keywords/phrases in the input fields of **All**, **Any**, or **None of the Keywords/Phrases** with matching requirements accordingly.



The screenshot shows the GrantForward website's search interface in "Advanced Keyword Search" mode. There are three input fields: "All of the Keywords/Phrases" containing "'big data'", "Any of the Keywords/Phrases" containing "social science 'social media'", and "None of the Keywords/Phrases" containing "biology". To the right of the input fields is a blue button labeled "- Advanced Keyword Search". Below the input fields are two buttons: "Search" and "Reset To Default".

GrantForward QuickTip  
For Researchers

Trying a Keyword Search

For more guidance, you can view a step by step demo--  
[\*\*QuickTip: Trying a Keyword Search\*\*](#)

## Viewing Search Results

After running a search, you can view and sift through the results.

- 1 At the top of the results, you can see the summary of the search conditions. You can sort the results by **Relevance**, **Deadline**, or other properties. You can navigate to the **Next** or **Previous** page of results.

The screenshot shows a search results interface. At the top left, it says "Found 30 results in 1.54 seconds". To the right, there is a "Sort by" dropdown menu currently set to "Relevance". A dropdown menu is open, showing options: "Relevance", "Deadline", "Newest", "Sponsor", and "Title". To the right of the sort menu are buttons for "Export", "Save/Load", and "Url". Below the sort menu, there are two search filters: "Has keywords: +\"big data\" social science \"social media\" -biology" and "With applicant types: Individual, Organization, including unspecified". To the right of these filters, it says "status: Continuous, Open". At the bottom left, there is a "« Previous" button. In the center, there is a "Layout:" section with two icons for grid and list views. At the bottom right, there is a "Next »" button.

- 2 Each result will list the title, sponsors, deadline, description excerpt of a grant, etc. The matching keywords are highlighted so that you can quickly determine if the grant matches well what you are looking for.

The screenshot shows a grant detail card. On the left, there is a dark blue box with the number "8" and the text "January 2022". To the right of this box, the title is "Notice of Special Interest (NOSI): The Application of Big Data Analytics to Drug Abuse Research". Below the title, it says "National Institute on Drug Abuse" and "U.S. Department of Health and Human Services". There is a link for "1 more sponsor". The description starts with "capabilities are producing extraordinary capacity and opportunity to integrate and analyze these data, thereby enabling novel research into complex disorders such as drug abuse and addiction that are driven by the dynamic interactions of diverse biological, social ... that are encouraged include, but are not limited to: Applications across the entire range of science...". At the bottom, there is a table with columns: "Amount", "Deadlines", "Eligibility", and "Submission Info". The "Amount" column contains "No Information". At the bottom right, there is a button that says "Exclude from Your Search".

- 3 Click on the title of a grant to go to the **grant detail page** with more information and links to the opportunity and application pages.

The screenshot shows the grant detail page. At the top, the title is "Notice of Special Interest (NOSI): The Application of Big Data Analytics to Drug Abuse Research". Below the title, it says "This opportunity was added on March 12, 2020 and was last checked on April 25, 2021." There are buttons for "Annotate", "Export", "Favorite", "Share", and "Add Tag". On the right side, there are two buttons: "Application URL" and "Opportunity Source". Below these buttons, there is a section titled "Researchers Matching This Opportunity" with a profile picture and the name "Ge Jiang". At the bottom left, there is a "Description" section with the text "Notice Number: NOT-DA-19-041" and "Purpose".

## Adding Search Filters

To further narrow down your search results beyond topical relevance (by keywords/phrases), you can add more search filters -- including **Sponsors**, **Deadline**, **Amount**, **Sponsor Types**, **Grant Types**, **Applicant Types**, etc.

- 1 On the **Search Grant Opportunities** page, you will see all filters listed on the left side.
- 2 Set the filters to add additional criteria for matching your desired grants. E.g., you can set **Deadline** to focus on a certain period and **Grant Types** to include specific types that apply to you.
  - To learn more information about each filter, move your mouse cursor over the icon **i**.
  - After adding any filters, the current search conditions will be summarized and displayed above the search results. You can remove a condition by clicking on its "x" in the search summary.
  - The search results will automatically be updated with added filters.

The screenshot displays the GrantForward search interface. On the left, a sidebar contains filter categories: Sponsors, Categories, Deadline, Status, Amount, and Sponsor Types. The Status filter is expanded, showing 'Open', 'Continuous', and 'Closed' options, all of which are checked. The Amount filter is set to 'Federal / State', and the Sponsor Types filter is also set to 'Federal / State'. The main search area shows a summary of applied filters: 'Has keywords: +big data', 'With current status: Open, Continuous', 'Of sponsor types: Federal/State', 'Of grant types: Research Project', 'Not of grant types: Fellowship/Scholarship/Dissertation', 'With applicant types: Individual, Senior Researcher, Organizatio...', and 'Not with applicant types: Undergraduate, including unspecified gra...'. Below the filters, there are navigation buttons for 'Previous' and 'Next', and a 'Layout' selector. The search results section features a prominent card for a 'Notice of Special Interest (NOSI): Biomarkers and Biotypes of Drug Addiction' from the National Institute on Drug Abuse, U.S. Department of Health and Human Services, dated May 2023. The card includes a star icon and a tag icon. The text of the notice discusses substance use disorder categorization and the use of Big Data analytics.

GrantForwardQuickTip  
For Researchers  
Searching With Advanced Search Filters

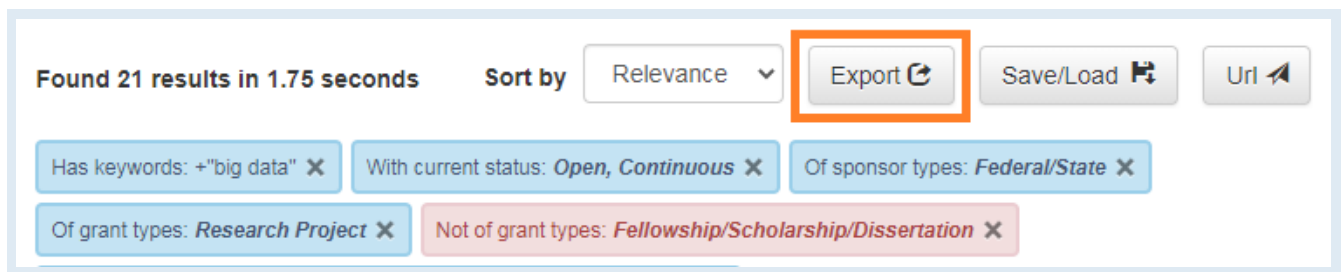
For more guidance, you can view a step by step demo--  
**QuickTip: Searching with Advanced Search Filters**

# Managing Search Results

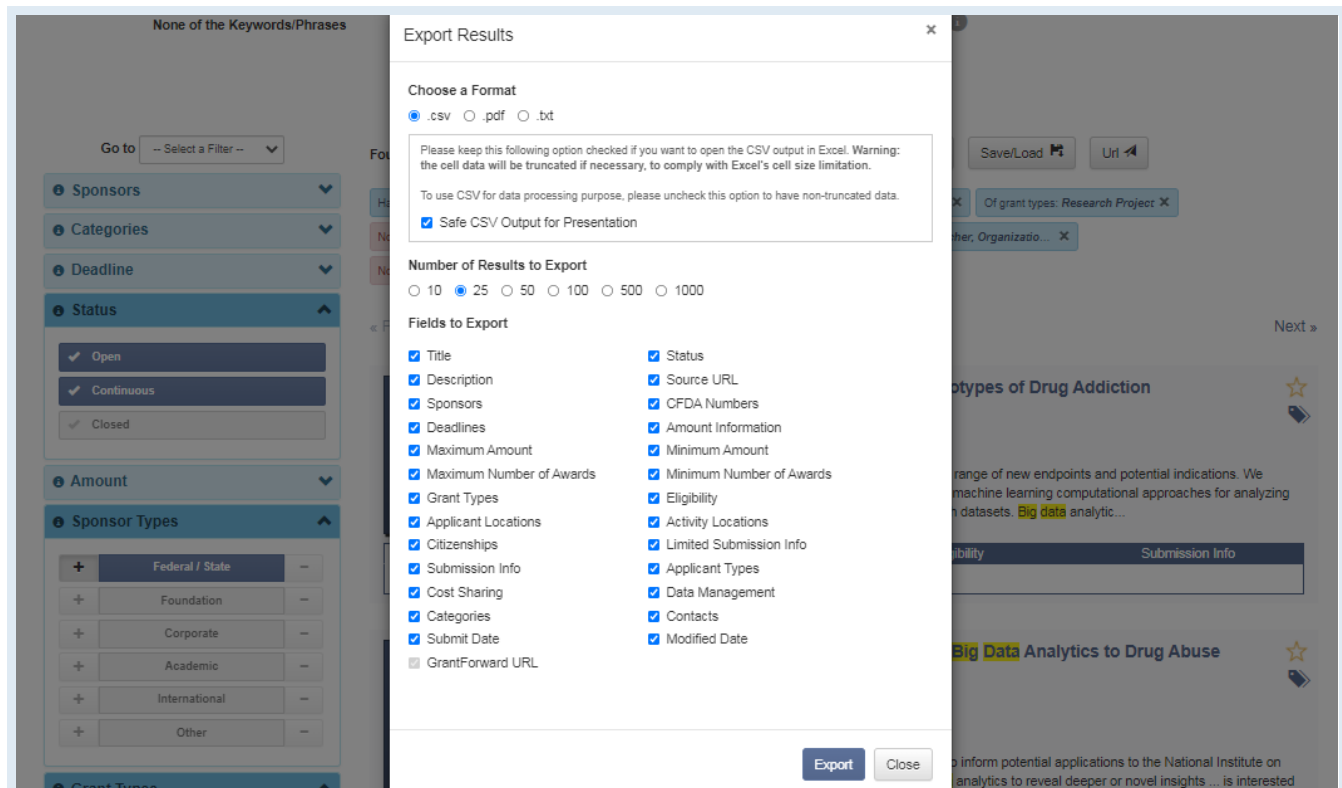
For future reference, sharing, or keeping track of your search results, you can export and share search results or save a search to get grant alerts.

## Exporting Search Results

- 1 To export a **list of search results**, after setting your search up by keywords/phrases and other filters, click on the **Export** button above the search results.

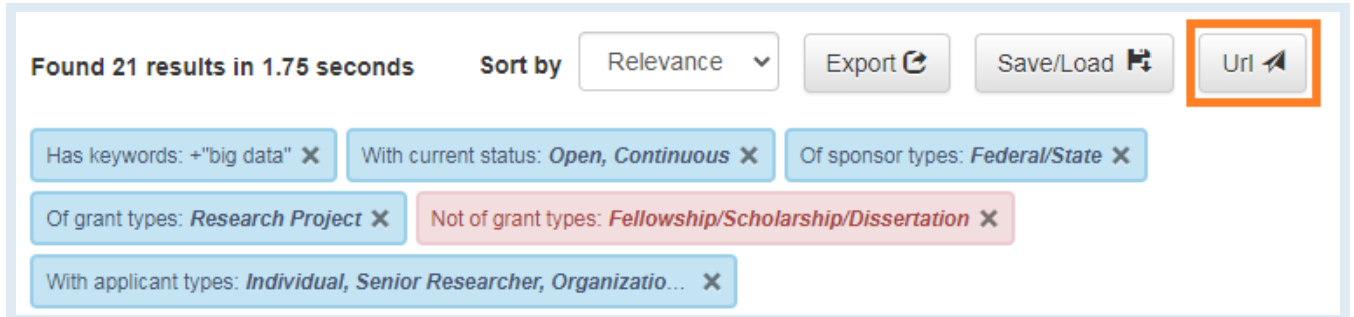


- 2 In the dialog box, you can select the file format, the number of results, and the fields to export. Then, click **Export** to download the file.

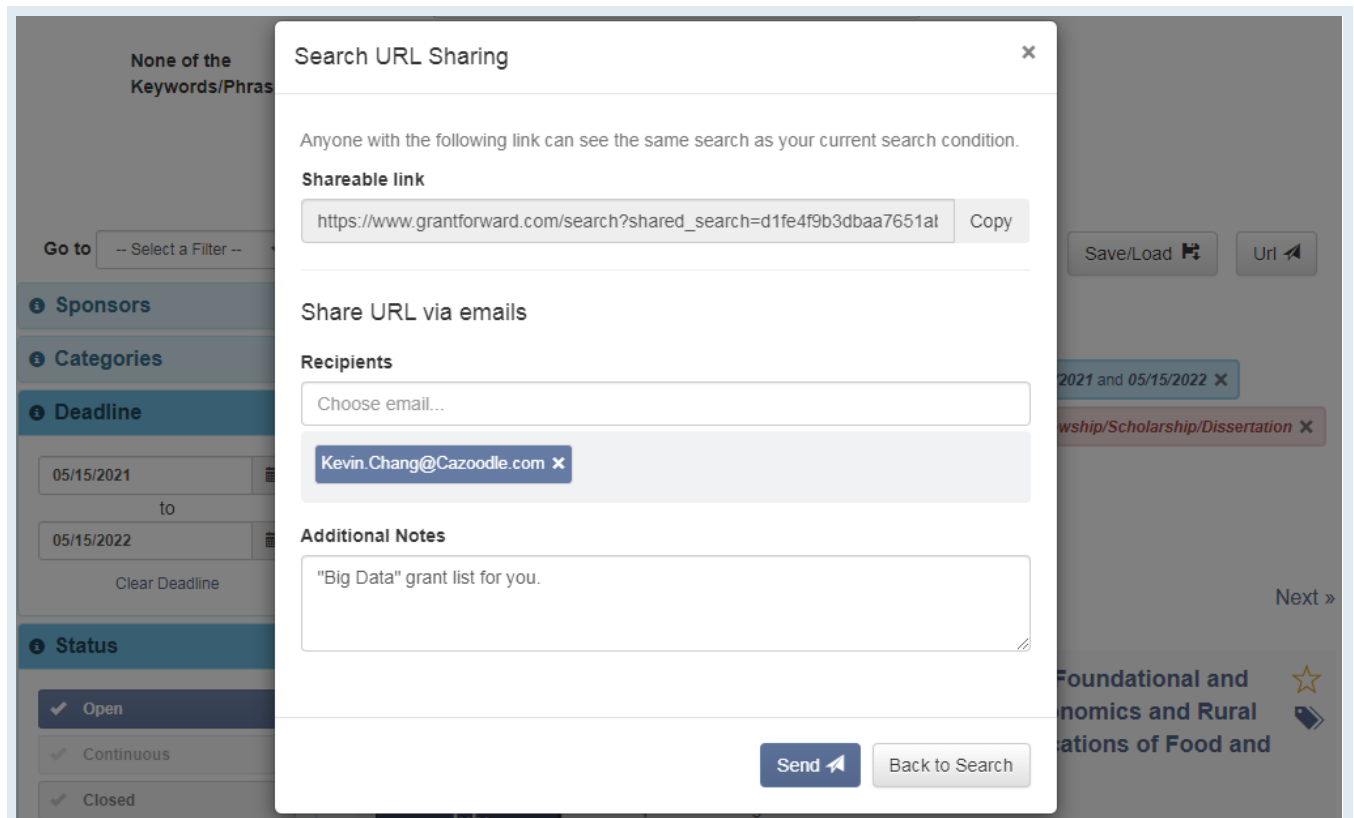


# Sharing a Search

- 1 Share your search under URL format with your friends/colleagues by clicking on the URL button above the search results.



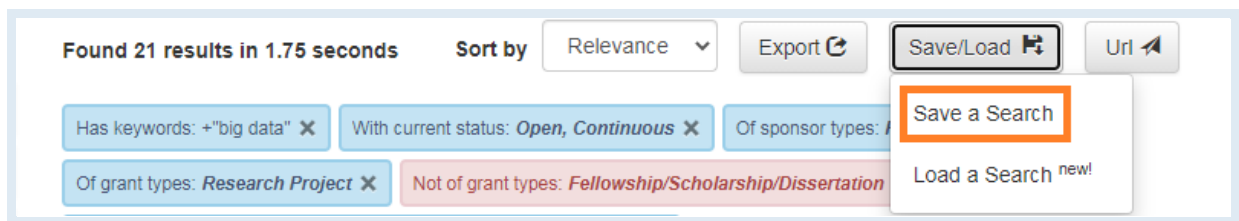
- 2 You can send the shareable URL directly to your friends/colleagues or send it with additional messages via emails, and the recipients will be able to view your search with full conditions.



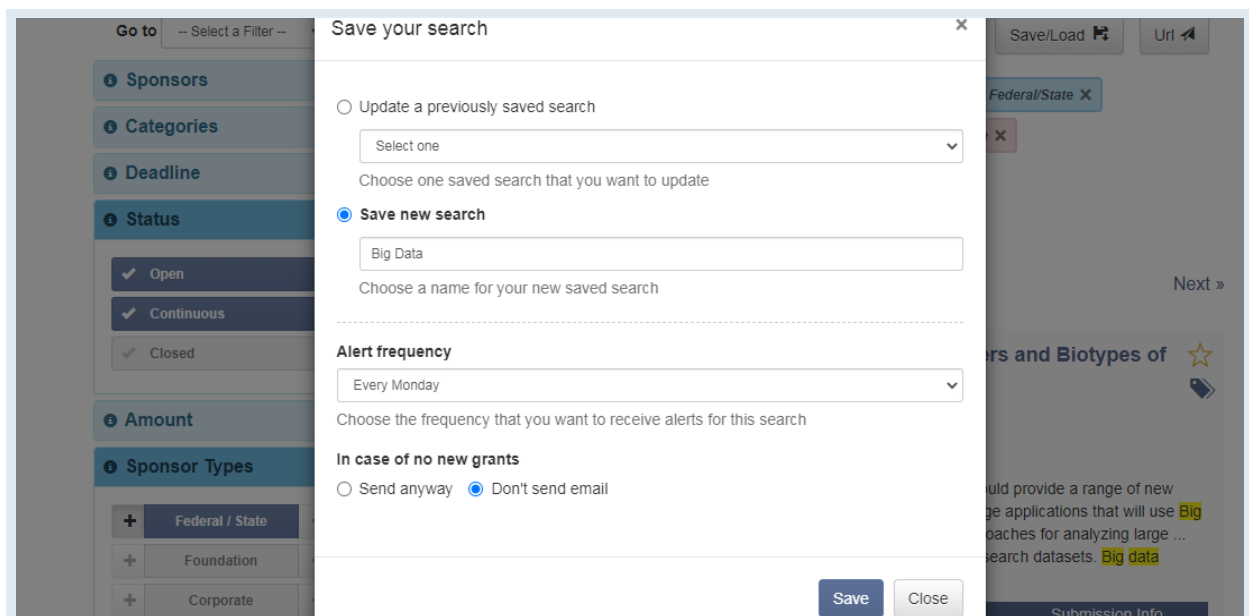
## Saving/Loading a Search

After setting up a search, instead of recreating the same search every time you want to see new grant opportunities within the selected search criteria, you can set up a saved search with email alerts to automatically get notifications. Saved searches now can also be loaded directly on the search page, or assigned as a default condition.

- 1 To **save your search**, after setting your search up by keywords/phrases and other filters, click on the **Save/Load** button above the search results, then choose **Save a Search**.

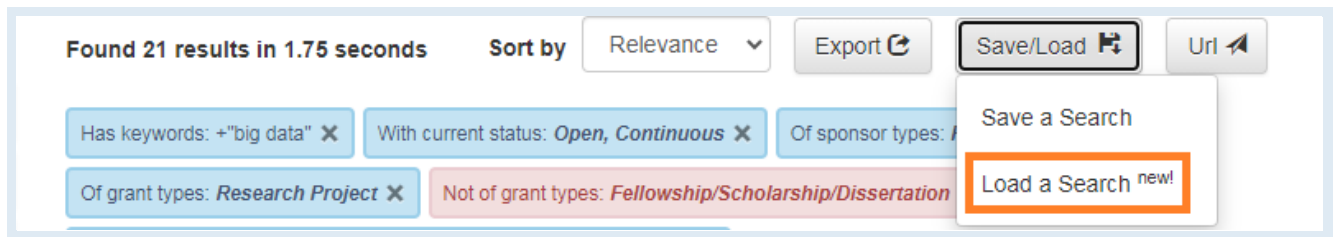


- In the pop-up dialog box, you can choose to update a previously saved search or create a new one. Then set the frequency (daily, weekly, or monthly) for receiving alerts whenever there are new grants updated to the list.
- To view or edit your saved searches, you can find them at the [Saved Searches](#) page under the **Grants** tab.

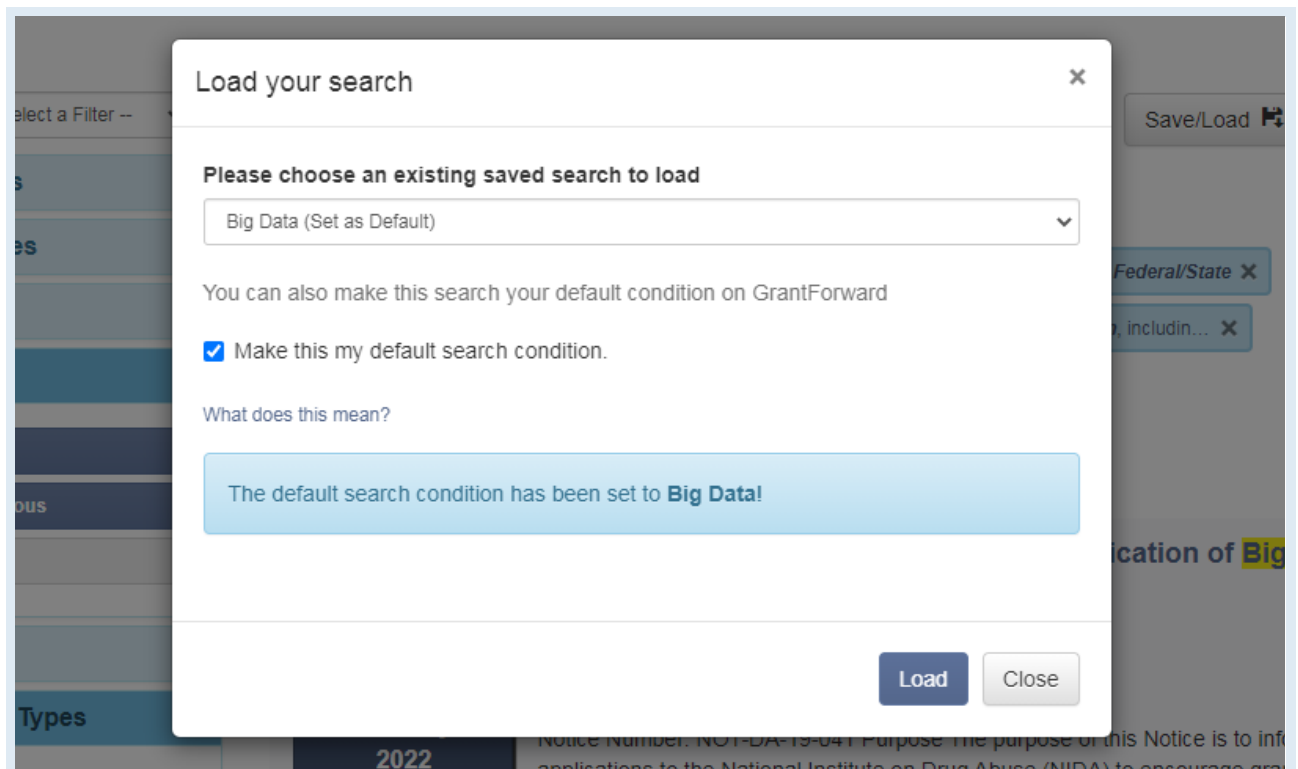




2 Saved searches now can also be loaded directly on the search page. To load a search, click on the **Save/Load** button, then select **Load a Search**.



- In the pop-up dialog box, you can choose an existing saved search, then the previous search results with full search conditions will be loaded. You can also make this search your default search condition so that it will be displayed whenever you visit the Grant Search page.



GrantForward QuickTip  
For Researchers

Saving Your Search →

For more guidance, you can view a step by step demo--  
**QuickTip: Saving Your Search**

# Managing Grants

We support many advanced features to help users get better grant management. You can build your lists including the best fit grants and then keep track of them.

## Exporting a Grant

- 1 You can export an individual grant by clicking on the title of the desired grant to view the grant detail page.
- 2 Click on the **Export** button under the grant title.

Give Together Grant Programs: Towbes Fund for the Performing Arts

This opportunity was added on September 10, 2021 and was last checked on September 10, 2021.

Export Favorite Share Add to List

Application URL Opportunity Source Create Proposal new!

- 3 In the pop-up dialog box, you can choose the file format and the fields to export. Then, click on **Export** to download the grant.

Export Results

Choose a Format

.csv  .pdf  .txt

Please keep this following option checked if you want to open the CSV output in Excel. Warning: the cell data will be truncated if necessary, to comply with Excel's cell size limitation.

To use CSV for data processing purpose, please uncheck this option to have non-truncated data.

Safe CSV Output for Presentation

Fields to Export

<input checked="" type="checkbox"/> Title	<input checked="" type="checkbox"/> Status
<input checked="" type="checkbox"/> Description	<input checked="" type="checkbox"/> Source URL
<input checked="" type="checkbox"/> Sponsors	<input checked="" type="checkbox"/> CFDA Numbers
<input checked="" type="checkbox"/> Deadlines	<input checked="" type="checkbox"/> Amount Information
<input checked="" type="checkbox"/> Maximum Amount	<input checked="" type="checkbox"/> Minimum Amount
<input checked="" type="checkbox"/> Maximum Number of Awards	<input checked="" type="checkbox"/> Minimum Number of Awards
<input checked="" type="checkbox"/> Grant Types	<input checked="" type="checkbox"/> Eligibility
<input checked="" type="checkbox"/> Applicant Locations	<input checked="" type="checkbox"/> Activity Locations
<input checked="" type="checkbox"/> Citizenships	<input checked="" type="checkbox"/> Limited Submission Info
<input checked="" type="checkbox"/> Submission Info	<input checked="" type="checkbox"/> Applicant Types
<input checked="" type="checkbox"/> Cost Sharing	<input checked="" type="checkbox"/> Data Management
<input checked="" type="checkbox"/> Categories	<input checked="" type="checkbox"/> Contacts
<input checked="" type="checkbox"/> Submit Date	<input checked="" type="checkbox"/> Modified Date
<input type="checkbox"/> GrantForward URL	

Export Close

## Adding a Grant to Favorites

1 There are two ways allowing you to mark a grant as your favorite to view it later quickly without having to set up the search and find it again.

- You can click on the ☆ button displayed on the right side of the grant title when this grant is shown in the search results.

The screenshot shows a grant card with a dark blue header containing the number '8' and 'September 2023'. The main title is 'Notice of Special Interest (NOSI): Mentored Career Development Award in Large-Scale Clinical Study Development and Analysis'. Below the title, it lists the sponsor as 'National Institute on Drug Abuse' and 'U.S. Department of Health and Human Services', with '1 more sponsor'. A snippet of the grant description is visible: 'will need training in "Big Data" techniques in addition to traditional experimental/analytical'. On the right side of the card, there is a star icon (☆) with an orange arrow pointing to it and a text box that says 'Click on the star button to add this grant to Favorites.'

- You can view a grant detail page and then click on the **Favorite** button to mark it as your favorite.


The screenshot shows a grant detail page for 'Give Together Grant Programs: Towbes Fund for the Performing Arts'. It includes a date note: 'This opportunity was added on September 10, 2021 and was last checked on September 10, 2021.' At the bottom, there are several buttons: 'Export', 'Favorite' (highlighted with an orange box), 'Share', and 'Add to List'. On the right side, there are three large buttons: '→ Application', '→ Opportunity', and '→ Create P'.

2 You will be able to view all favorite grants at the [Grant Lists](#) page under the **Grants** tab and export that favorite list.

The screenshot shows the 'Grant List Management' page. It features a sidebar on the left with a 'Favorite' section containing a list of categories: 'Big Data (1)', 'Environment (1)', 'Art (1)', and 'musical (2)'. The main content area shows 'Found 8 results' and a table of grants. The first grant listed is 'P-12 Schools - Green & Clean Energy Solutions (PON 4157)' from the 'New York State' and 'New York State Energy Research and Development Authority'. The grant is marked as a favorite with a star icon. Below the grant title, there is a table with columns: 'Amount', 'Deadline', 'Eligibility', and 'Submission Info'. The 'Amount' column shows '\$4,000,000 Available'. At the top right of the page, there are buttons for 'Manage Grant Lists' and 'Export'.

## Building a Grant List

1 You are able to build a list from individual grants in a specific research topic in two ways:

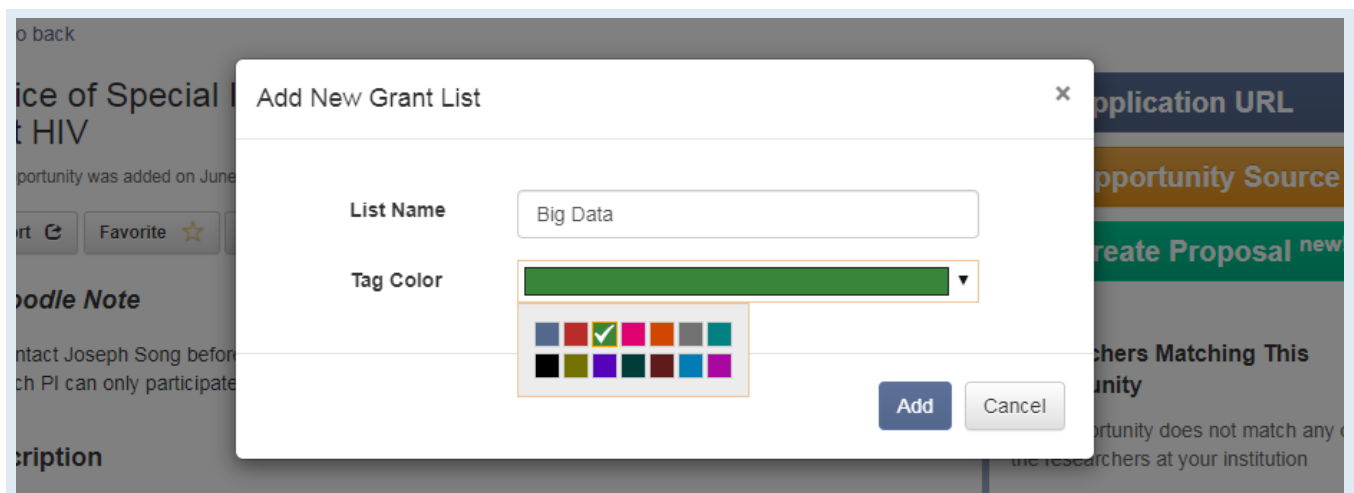
- Click on the  button displayed on the right side of the grant title when it is shown in the search results.



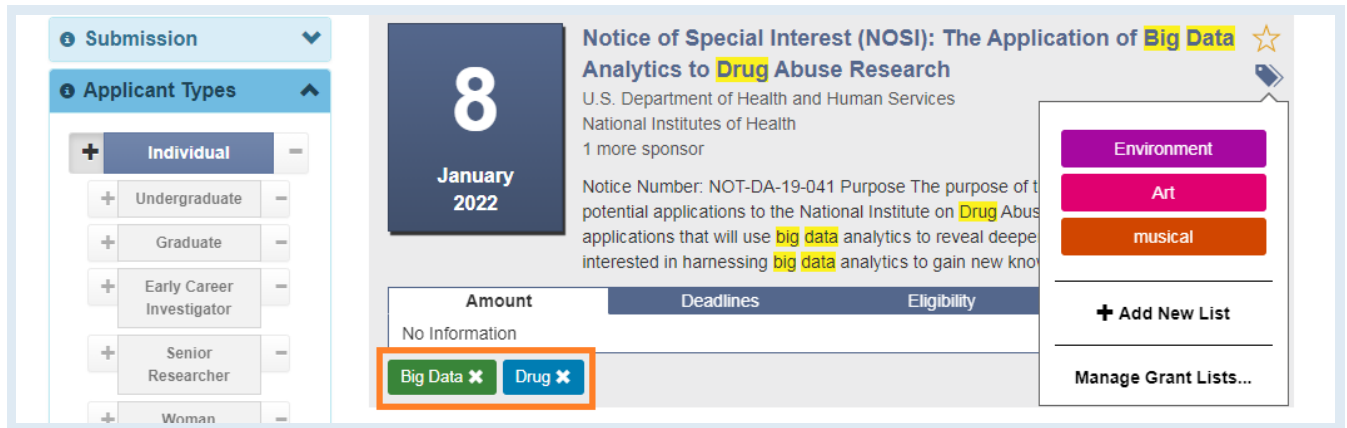
- Or when viewing a grant detail page, you can click on the **Add to List** button.



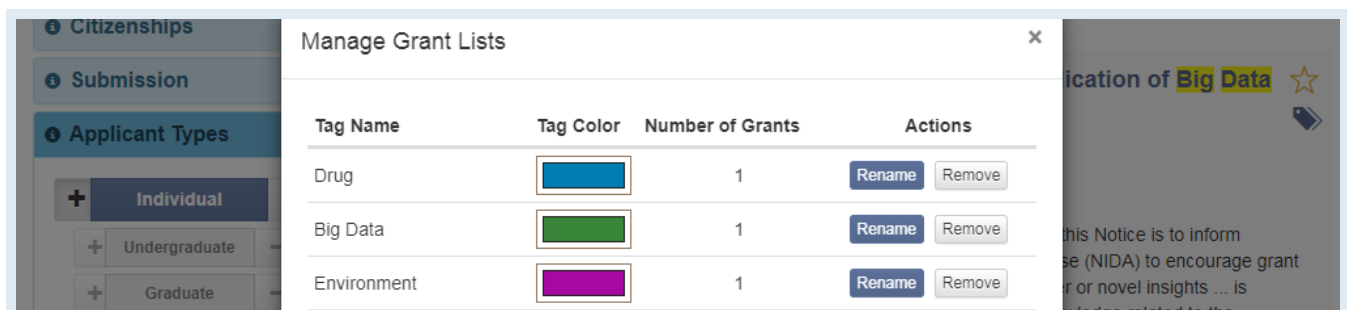
2 In the dialog box, you can choose the name and color for the list that will contain your desired grants.



You can also add a grant to available lists that you build before when the grant list is shown. One grant can belong to several lists and the list tags will be displayed along with that grant for easier recognition. A tag can be easily removed from a grant when you click on its “x”.



**3** Click on **Manage Grant Lists...** to perform some actions such as changing list color or list name, removing a list, or adding a new list.



**4** You will be able to view all your grant lists at the [Grant Lists](#) page under the **Grants** tab and export those lists.

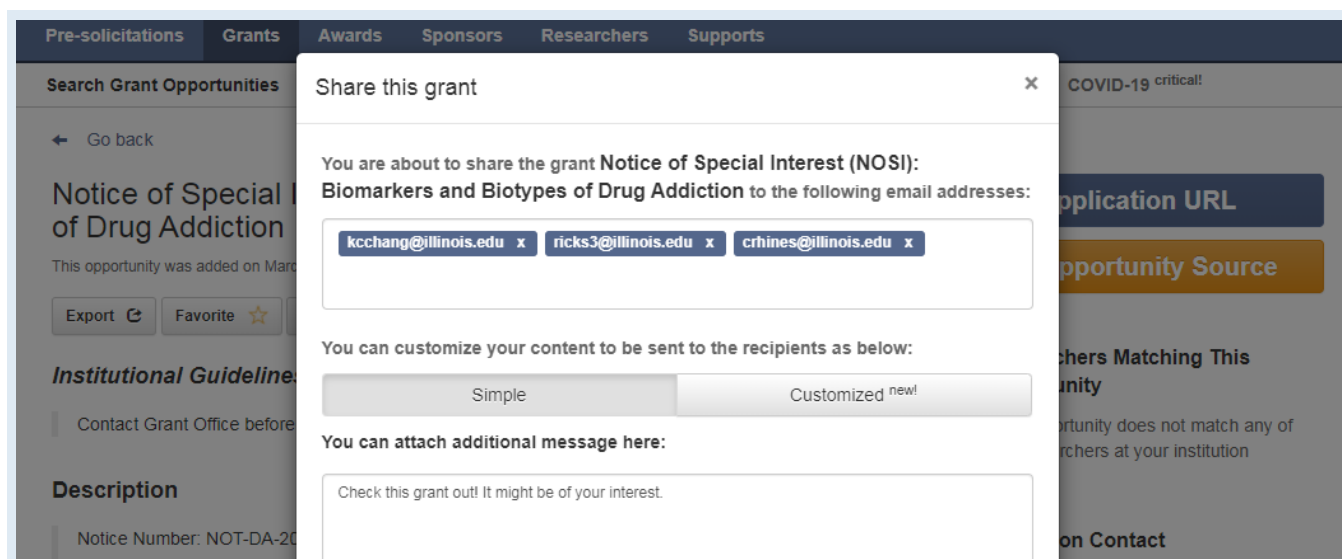


## Sharing a Grant

- 1 You can share an individual grant with your friends/colleagues via emails by visiting a grant detail page and clicking on the **Share** button.



- 2 In the dialog box, enter the email address of the recipients that you intend to send to. The content can be customized on your own to have additional messages along with the grant.



- 3 You can view all the grants that you have shared on the [Shared](#) page under the **Grants** tab.

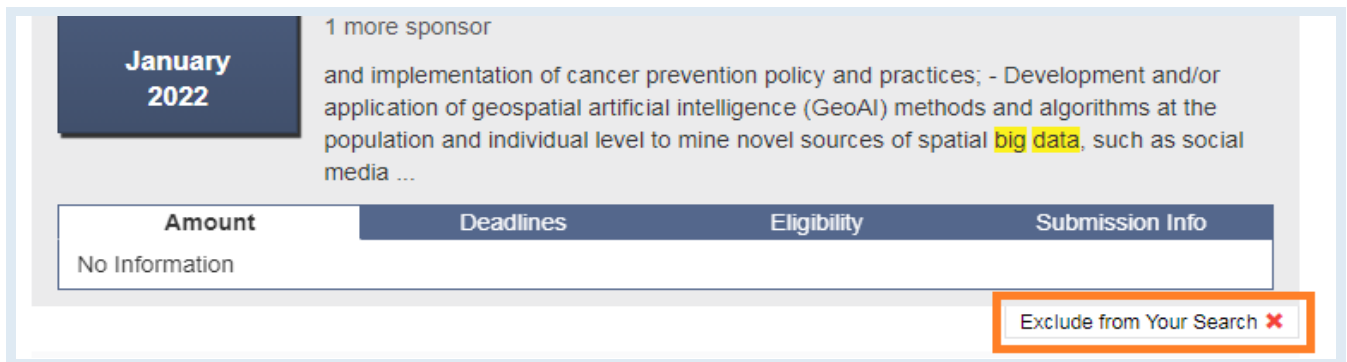


The screenshot shows the "Shared Grants" page. It includes a header "Shared Grants" and a sub-header "You can review all the opportunities you have shared with your colleagues / fellow researchers / etc...". Below the header, there is a table with columns for "Shared Date", "Shared Grant Title", "Recipients", and "Status". The table contains two rows of data.

Shared Date	Shared Grant Title	Recipients	Status
May 6th 2021, 3:13:44 pm	Notice of Special Interest (NOSI): The Application of Big Data Analytics to Drug Abuse Research	kcchang@cs.uiuc.edu	Active (expire on May 20th 2021, 3:13:44 pm)
May 6th 2021, 3:13:07 pm	Notice of Special Interest (NOSI): Biomarkers and Biotypes of Drug Addiction	kcchang@illinois.edu	Active (expire on May 20th 2021, 3:13:07 pm)

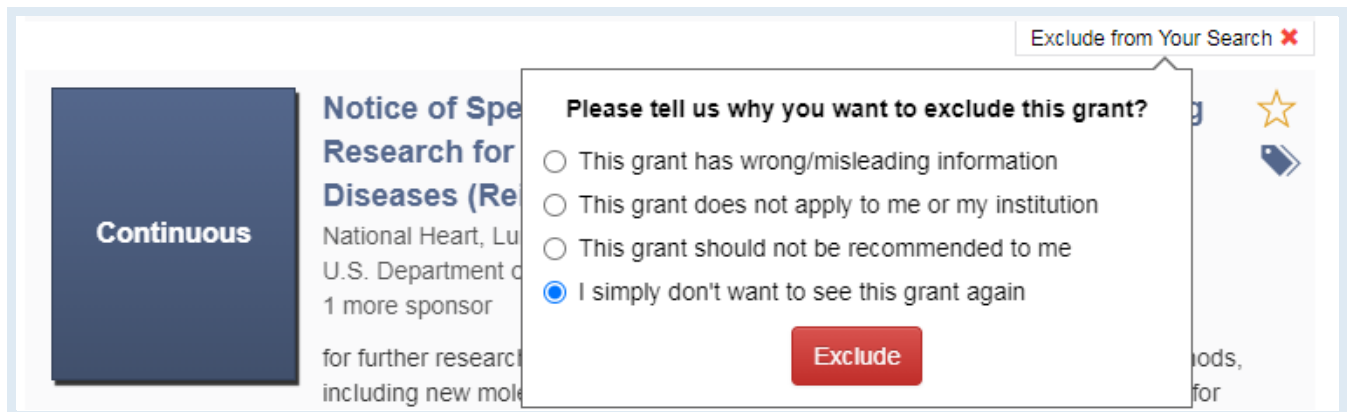
## Excluding a Grant

- 1 When there are some grants from the search results which do not suit your research needs well, you will have the ability to exclude them from the search. To no longer see a grant, you can move your mouse cursor to a grant area to show the exclusion function.



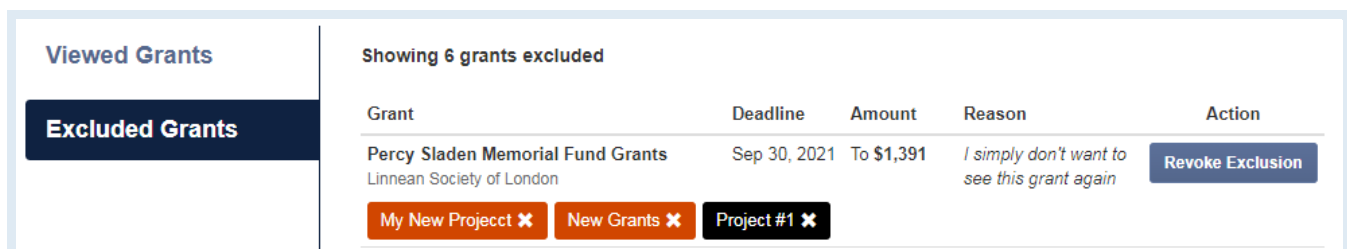
The screenshot shows a grant card with a dark blue header containing the text "January 2022". Below the header, there is a table with four columns: "Amount", "Deadlines", "Eligibility", and "Submission Info". The "Amount" column contains the text "No Information". At the bottom right of the card, there is a button labeled "Exclude from Your Search" with a red 'x' icon, which is highlighted with an orange border.

- 2 Click on the **Exclude from Your Search** button and choose a reason for the exclusion. We're always willing to hear users' feedback to improve our service quality better.



The screenshot shows a dialog box titled "Please tell us why you want to exclude this grant?". The dialog box has four radio button options: "This grant has wrong/misleading information", "This grant does not apply to me or my institution", "This grant should not be recommended to me", and "I simply don't want to see this grant again". The last option is selected. Below the options is a red "Exclude" button. The background shows a grant card with a dark blue header containing the text "Continuous".

- 3 You can view all excluded grants at the [History](#) page under the **Grants** tab and revoke exclusion at any time. All grants that you have viewed are also displayed there.



The screenshot shows a "Viewed Grants" page with a dark blue header containing the text "Excluded Grants". Below the header, there is a table with the following columns: "Grant", "Deadline", "Amount", "Reason", and "Action". The table contains one row of data:

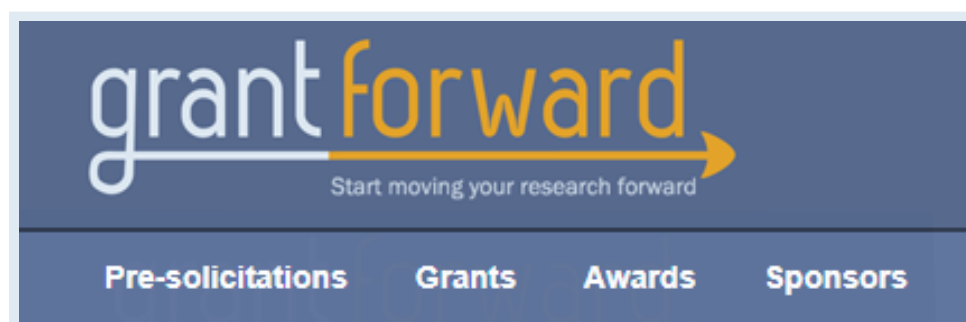
Grant	Deadline	Amount	Reason	Action
Percy Sladen Memorial Fund Grants Linnean Society of London	Sep 30, 2021	To \$1,391	I simply don't want to see this grant again	Revoke Exclusion

Below the table, there are three buttons: "My New Project" with a red 'x' icon, "New Grants" with a red 'x' icon, and "Project #1" with a red 'x' icon.

# Checking Out Pre-solicitations, Awards, and Sponsors

Not only grants but we also provide a comprehensive database of sponsors, pre-solicitations, and awards to create a complete award-seeking cycle to help you get insights into the grant cycle, so you will never miss any grants.

- The [Pre-solicitations](#) page offers a database of the notices from sponsors which provide a heads-up that solicitation will be released and solicit capability responses from responsible vendors so that you will have sufficient time to prepare better for submitting applications later. You can find to-be-announced grants by keywords/phrases and add available filters such as amount or estimated grant call date, etc.
- On the [Awards](#) page, you can find who/what institutions were winning grants and what research topics have been funded by using keywords/phrases and various filters such as status or award type, etc.
- The [Sponsor Directory](#) will show you over 18,000 sponsors worldwide on our system which can be searched by name or sponsor type. You can click on any sponsors to see detailed information and their grants on GrantForward.

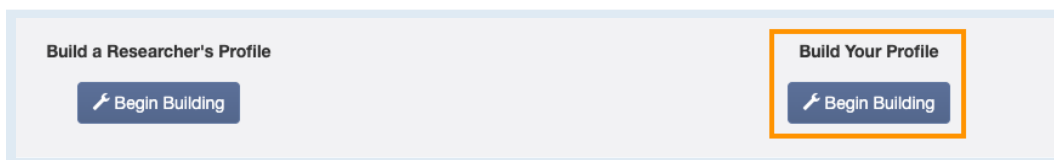




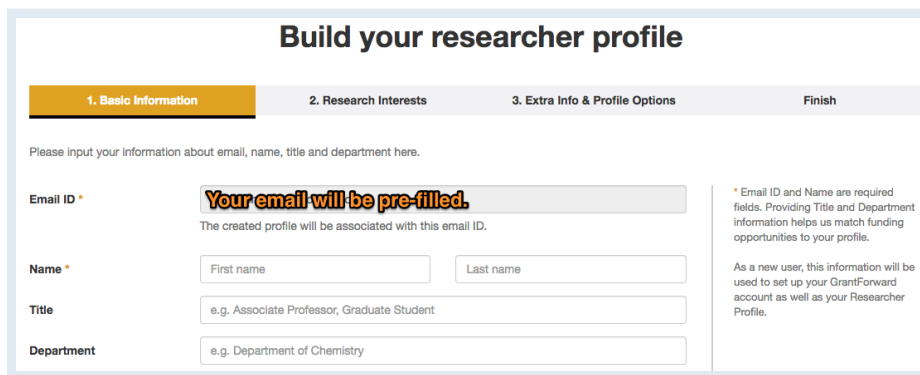
# Creating Your Researcher Profile

With a researcher profile, you will have a “homepage” that nicely displays your experience and publications, and you can start receiving automatic grant recommendations that are tailored to your research interests.

- 1 Under the **Researchers** tab, click on **Create Profiles**.
- 2 Select the **Begin Building** button under **Build Your Profile**.

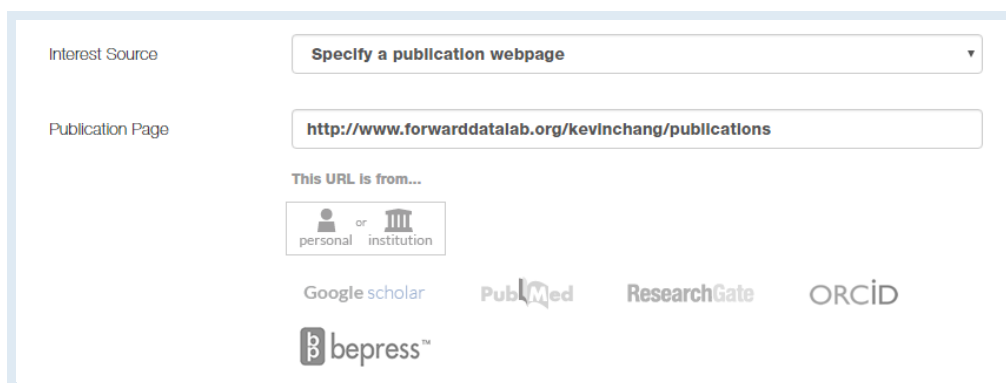


- 3 The first page asks about your **Basic Information**.



- 4 The second page asks about your **Research Interests**-- which you can indicate by specifying an **Interest Source**, i.e., where to find your publications. You can select one of the three ways from the dropdown.

- If you have an existing research or publication webpage, enter the URL into the **Publication Page** box.



- You can also upload your CV PDF (which contains publications).

The screenshot shows a form with two main sections. The top section is labeled 'Interest Source' and contains a dropdown menu with the selected option 'Upload a Curriculum Vitae'. The bottom section is labeled 'Upload your CV' and features a blue button with a plus icon and the text 'Choose File'. Below this button, it states 'Upload PDF file, maximum size 10MB'.

- Or, you can manually copy and paste your publication citation text.

The screenshot shows a form with two main sections. The top section is labeled 'Interest Source' and contains a dropdown menu with the selected option 'Manually input publications'. The bottom section is labeled 'Publication Titles' and contains a text input field with the example text: 'e.g. M. Phillips, "Reducing the cost of Bluetooth systems", Electronics & Communication Engineering Journal, vol. 13, no. 5, pp. 204-208, Oct. 2001'.

- 5** In addition to specifying your publications, you can also add **Other Interests** that are not reflected by your publications. Just click on the **Add more interests...** button, and then enter the keyword and move the scrollbar to indicate its importance.

The screenshot shows a form with a section labeled 'Other Interests'. It contains a text input field with the text 'Life Science' and a small 'x' icon to its right. To the right of the input field is a horizontal slider with 'Low' on the left and 'High' on the right, and a white knob in the middle. An orange arrow points from the 'Life Science' text to the slider knob. Below the input field is a blue button with a plus icon and the text '+ Add more interests...'.

- 6** **The third page** asks about **Extra Info & Profile Options**. You can enrich your profile with more information about your education, biography, contact, your photo, and links to your homepages.

The screenshot shows a form with a section labeled 'Extra profile information'. It contains three main sections: 'Education (optional)' with a text input field containing 'PhD, Electrical Engineering, Stanford University' and a blue link '(+) Add another education'; 'Biography (optional)' with a large text input field containing 'Introduction about one's background, or career'; and 'Picture (optional)' with a small image placeholder and a note: 'This allow us to display a picture of yours on the profile. It is recommended to upload images which are below 1MB in size.'

7 Lastly, you can adjust your **Profile Options**-- including profile viewability, what you wish to display on your profile, and-- most importantly-- the frequency (daily, weekly, monthly) of receiving recommendation emails.

**Profile Options**

**Profile Viewability**  Private  
The profile is private and is only visible to the members of the same institution.

**Display Basic Information**  No

**Display Research Interest**  Yes

**Display Publications**  No

**Display Colleagues**  Yes

**Display Co-Authors**  Yes

**Display Also Viewed Profiles**  Yes

**Display Recommendations**  Yes

**Receive Recommendation Emails** Weekly

8 Now your GrantForward Researcher Profile is complete! The system will take a few minutes to complete building your profile.

**Profile submission completed successfully!**

You have created profile for researcher Kevin Chang in your institution. Later on he/she can claim this profile and use it to explore GrantForward's funding options.

The rebuilding process will take a while, depending on whether you have updated interest information or not. In the mean time you can try:

- [Build a profile for another researcher](#)
- [Search for funding opportunities](#)

**Building profile for Kevin Chang**

The process can take anywhere from 5 to 20 minutes and continue even if you leave this page

9 When the processing is completed, you can view it by clicking on the **Researchers** tab and choosing **My Profile**. If you wish to edit your profile, you can choose **Edit My Profile**.



For more guidance, you can view a step by step demo--  
[\*\*QuickTip: \*Creating Your Profile\*\*\*](#)

# Getting to Know Your Profile

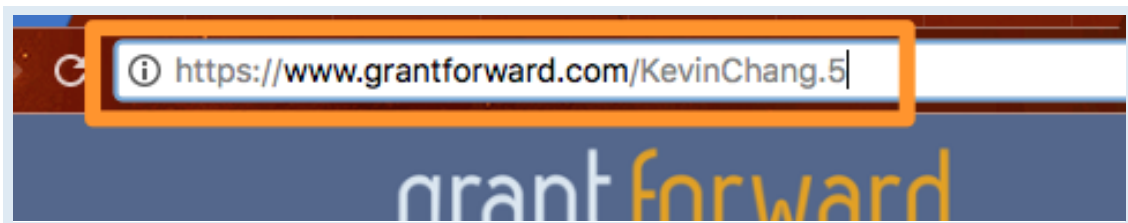
Now that you have a Researcher Profile, you can explore your profile. To start using your profile:

- 1 Go to the **My Profile** page under the **Researchers** tab. Here you can view your profile and get to know its various components.

The screenshot displays a researcher profile for Kevin Chang. The profile includes a header with a photo and contact details, followed by a 'Basic and Contact Info' section. The 'Research Interests' section features tags for 'Social Media', 'Big Data', and 'Community Detection'. The right sidebar contains a search bar, a list of colleagues, and a list of co-authors. The main content area is dominated by a 'Research Interest Cloud' and a 'Timeline' showing interests from 1997 to 2017. Below these is a 'Publications' section with a table of recent work.

- 2 Take a look at your **Research Interests** Cloud and Timeline. You can embed it on any website of your choosing by clicking on the **Embed** button above it to get the HTML code.

- 3 You can use your researcher profile as your research homepage that integrates all your essential information and research. Look at the browser address bar for the URL to share:



# Receiving Grant Recommendations

With a Researcher Profile created, you can receive grant recommendations based on your research interests, on GrantForward, or via emails. To view your recommended grants and set up email notifications:

- 1 Go to the **Recommendations** page under the **Grants** tab, which lists the recommended grants for you based on your research interests keywords.
- 2 You can add filters to further tailor the recommendations: e.g., if you are a researcher, you may want to exclude some student-oriented grants.
- 3 You can set the frequency of grant recommendation emails (upper right).
- 4 You will receive emails with recommendations, where each grant will have your interest keywords highlighted.

The screenshot shows the user profile for Kevin Chang, Professor at the Department of Computer Science. The page is titled "Recommendation Email Frequency" and shows settings for "Monthly" email updates. Below this, there's a section for "Research Interest Keywords from Your Profile" with tabs for Social Media, Big Data, Community Detection, and Communicative Profile. The main content area is titled "Recommended Grants" and shows a list of grants. A "Filters" sidebar is visible on the left. One grant is highlighted with "Keyword Highlights" in orange, showing terms like "big data", "database technologies", and "life sciences".

The screenshot shows an email titled "Grant Recommendations from GrantForward" addressed to Kevin Chang. The email content includes a greeting, a thank you for using GrantForward, and a list of recommended grants. One grant is highlighted with "Keyword Highlights" in orange, showing terms like "big data", "materials data", and "machine learning".

GrantForward CaseStudy:  
For Researchers  
How Can I Tailor My  
Grant  
Recommendations?

After creating a Researcher Profile, you can make sure that the grant recommendations you are receiving are matching your research needs by tailoring your recommendation settings.

For more guidance, you can view detailed instructions--  
**CaseStudy: How Can I Tailor My Grant Recommendations?**

# Exploring Your Personalized Homepage

GrantForward provides a personalized homepage to help you quickly see institution updates, personal updates, user groups as well as view GrantForward database updates and connect with potential researchers.

**1** The Personalized Dashboard will keep your information up to date.

- **Institution Updates** tab shows notifications of what administrators performed such as changing your unit or permission, adding you to a group, or sharing a search template, a curated grant list, or a newsletter with you. You can also view those lists in this tab.

The screenshot shows the 'Institution Updates' tab selected. On the left is a sidebar with navigation options: Activity Feeds, Search Templates, Curated Grant Lists, and Newsletters. The main content area displays two notifications:

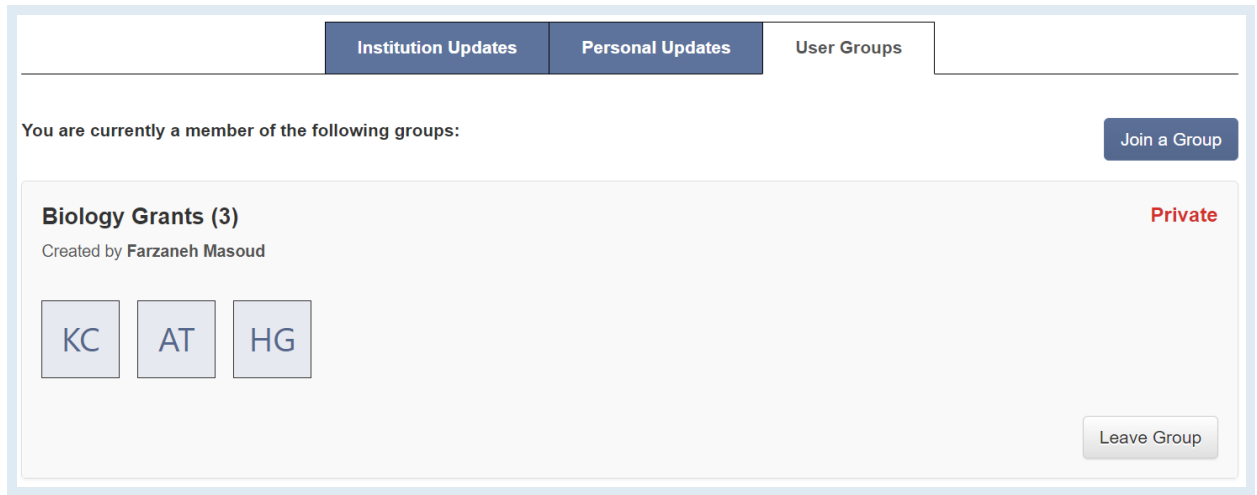
- Kevin Chang has changed your permission to **Administrator**. (Aug 23, 2021)
- Kevin Chang has shared a Search Template with you: [NIH and Health Related Sponsors](#). (Jun 10, 2021)

- **Personal Updates** tab displays the latest grant recommendations matching your research interests, updates from your favorite grant list, and new grants added to your saved searches.

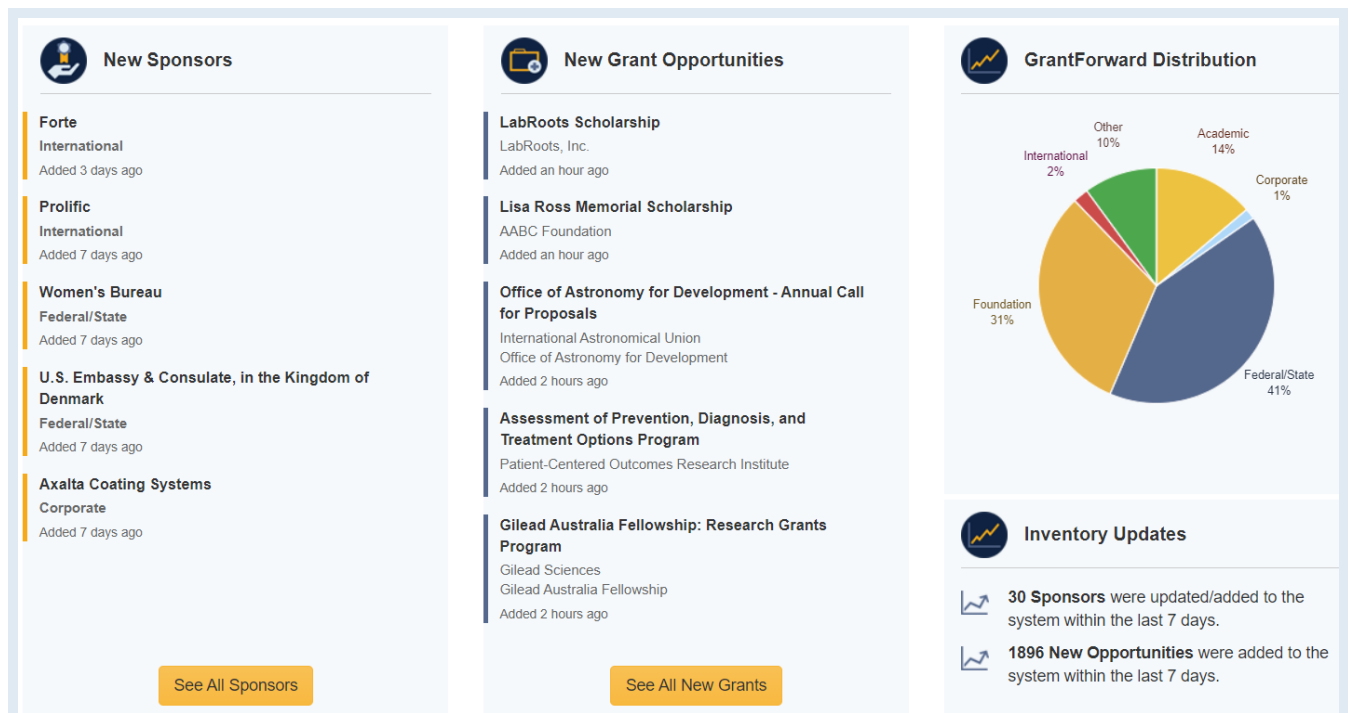
The screenshot shows the 'Personal Updates' tab selected. On the left is a sidebar with navigation options: New Recommended Grants, Favorite Grants, and Saved Searches Updates. The main content area displays 'Latest Recommendations' with a table of grant listings:

Grant	Deadline	Amount	Action
<b>Notice of Special Interest (NOSI): Administrative Supplements for COVID-19 Impacted NIMH Research</b> National Institute of Mental Health	Jun 01, 2023	See Detail	
<b>C4ISR, Information Operations, Cyberspace Operations and Information Technology System Research - Science, Technology, Engineering and Mathematics Research</b> U.S. Department of Defense United States Navy 1 more sponsor	Jun 03, 2021	See Detail	
<b>Covid-19 scientific research Program</b> European Synchrotron Radiation Facility	Continuous	See Detail	
<b>Strategic Grantmaking</b> ECMC Foundation	Continuous	See Detail	

- **Users Groups** tab shows all groups that you joined or were added by other administrators. You can also proactively join other groups you are interested in or leave any current groups.



- 2 GrantForward Database Updates allows you to view new sponsors, grant opportunities as well as the distribution of grants from different sponsor types, and the number of newly added sponsors and grants.



- 3 GrantForward displays researchers within your institution and across all institutions so that you can find potential researchers for collaborations. You can also check the status of your profile-creating process and take a survey to give feedback on how we can improve our service.